

# Checklist for Setting Up SaaS Freemium

## Phase 1: Planning & Strategy

### Define Your Value Proposition:

- Identify your core features and unique selling points.
- Determine your target audience and their needs.
- Craft a compelling free plan that showcases value.

### Choose Your Freemium Model:

- Traditional Freemium: Limited features, forever free. Define clear feature limitations.
- Free Trial: Full access, limited time. Set trial duration (e.g., 14 or 30 days).
- Usage-Based Freemium: Free up to a usage limit. Define usage limits (e.g., API calls, storage).

### Plan Your Upgrade Path:

- Clearly outline the benefits of upgrading.
- Highlight premium features and their value.
- Make the upgrade process simple and intuitive.

### Set Measurable Goals:

- Define your desired conversion rate.
- Establish acceptable churn rate targets.
- Determine your target Customer Acquisition Cost (CAC).
- Estimate your expected Customer Lifetime Value (CLTV).

## Phase 2: Implementation & Optimization

### Develop Your Free & Premium Versions:

- Ensure both versions offer a seamless user experience.
- Optimize onboarding for both free and paid users.

### Create a Clear Call to Action (CTA):

- Prominently display CTAs to encourage upgrades.
- Use compelling language and visuals.
- A/B test different CTAs to find what works best.

### Monitor Key Metrics:

- Track conversion rates and analyze trends.
- Monitor churn rates and identify causes.
- Calculate CAC and optimize acquisition channels.
- Measure CLTV and identify upselling opportunities.

### Gather User Feedback:

- Collect feedback through surveys and in-app prompts.
- Analyze feedback to identify areas for improvement.

### Continuously Iterate & Improve:

- A/B test different freemium model variations
- Refine your free plan based on user feedback.
- Regularly update your product with new features and improvements.

## Phase 3: Resources & Support

### Provide Comprehensive Documentation:

- Create help articles and FAQs for both free and paid users.
- Develop tutorials and guides to showcase product value.

### Offer Excellent Customer Support:

- Provide timely and helpful support to all users.
- Consider different support tiers for free and paid users.

### Build a Community:

- Create a forum or online community for users to connect.
- Encourage peer-to-peer support and knowledge sharing.